



CFD

LOCAL COORDINATOR TRAINING HANDBOOK



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Campaign Coordinator Description



Campaign coordinators are the heart of the Combined Fund Drive, the state's workplace giving campaign. As a volunteer campaign coordinator, you are responsible for running and promoting the campaign locally in your agency or department.

Objectives

- Educate colleagues about the many benefits to employees and charities of giving through the CFD.
- Provide opportunities for colleagues to contribute to their favorite charitable organizations via payroll deduction or check.
- Manage a successful campaign.

Responsibilities

- Attend coordinator training and become familiar with campaign strategies, rules, and procedures.
- Obtain management support.
- Recruit volunteers from your agency to assist with the campaign.
- Develop a campaign timeline and set goals.
- Distribute campaign information and materials to colleagues.
- Plan awareness meetings, activities, and events.
- Ask colleagues to consider giving to their favorite charities through the Combined Fund Drive.
- Recognize and thank volunteers, employees, managers, etc. at campaign end.



Seven Steps to a Successful Campaign

1. UNDERSTAND YOUR ROLE

- a. Attend coordinator trainings, coordinator kickoff events and charity fairs.
- b. Network with other coordinators.
- c. Explore the CFD website: www.cfd.wa.gov
- d. Use CFD staff as a resource for the running of your campaign.

2. OBTAIN MANAGEMENT SUPPORT

- a. Meet with your manager (director, supervisor, manager, etc.) Ask him/her to engage in:
 - Sending emails
 - Participating in kickoff event
 - Signing letters
 - Including CFD as agenda item at management and staff meetings
 - Thanking employees for considering giving to CFD
- b. Keep your manager informed:
 - Report campaign progress
 - Get events on his/her calendar
 - Provide materials and information to him/her for promoting campaign in your department

3. BUILD YOUR TEAM

- a. Recruit other enthusiastic, excited, passionate people from all areas of your unit, different job classifications, etc., to help you with the campaign.
- b. Give everyone a role: website, marketing, event planning, etc.
- c. Set goals.

4. CREATE YOUR CAMPAIGN PLAN

- a. CFD Campaign dates: October 1 – December 14
- b. Implement your plan according to your timeline.
- c. Include a communication strategy. Schedule ahead for events, when to send emails, etc.
- d. Be sure to get on agendas for meetings.
- e. Initiate “last week to give” strategies. There is a planned extension through December 9.

5. PROMOTE YOUR CAMPAIGN

- a. Be enthusiastic and excited!
- b. Work with your fellow volunteers to promote the CFD in your department.



- c. Schedule charity speakers if you can.
- d. Let everyone know what their dollars are doing in the community.
- e. Use your resources, including facts, publications, website, charity guides, newsletters, games, and emails.

6. MAKE THE ASK

- a. CFD website/posters/brochures/CFD video.
- b. Email.
- c. Kickoff and other events.
- d. Schedule a speaker at staff meetings.
- e. Management endorsement.
- f. Personal stories (employee, federations/charities).
- g. Personal ask: explain CFD, impact on community, and ask consideration of participating.

7. RECOGNIZE AND THANK

- a. Management for supporting CFD and you.
- b. Your team for helping make the campaign a success.
- c. Your coworkers for considering giving to their favorite charities through CFD.
- d. Your charity participants.
- e. Your sponsors.



2013 Campaign Timeline

Campaign Start Date: October 1, 2013



Campaign End Date: December 13, 2013

	<u>Date</u>	<u>Completed</u>
Attend coordinator training:	_____	_____
Create campaign plan including timeline, communication plan, events, and recognition:	_____	_____
Meet with supervisor to discuss campaign plan:	_____	_____
Recruit campaign team:	_____	_____
Set up team planning meetings:	_____	_____
Schedule presentations at staff meetings:	_____	_____
Schedule charity speakers:	_____	_____
Display posters:	_____	_____
Develop link to CFD on department intranet, if applicable:	_____	_____
Submit fundraiser form and checks to campaign leader, if applicable:	_____	_____
Submit nominations for awards ceremony by December 13, 2013:	_____	_____
Execute "Last Week to Give" strategies:	_____	_____
Report final results to staff:	_____	_____
Thank supervisor, colleagues, and team:	_____	_____
Attend CFD appreciation event:	_____	_____



Benefits of Giving

Benefits to Donors

- **Easy.** Simply choose between automated payroll deduction and a one-time gift.
- **Targeted.** You choose the contribution amount and the charities receiving your gift.
- **Safe.** CFD only lists charities that have been screened and approved.
- **Tax deductible.** You have a record of your payroll contribution.
- **Choice.** Give to the causes you are most passionate about by choosing from over 3,800 approved charities or writing in your favorite charity.
- **Effortless.** By using the payroll deduction option, you can spread your donation out over the entire year making it even easier to support your favorite charities.

Benefits to Charities

- **Charities save time and money.** Fewer staff are needed to process individual donations. Charities save the expense of multiple fundraising campaigns, so more dollars go to services.
- **Charities can budget.** Regular donations allow charities to better forecast their upcoming activities.
- **Charities depend on workplace giving.** The Combined Fund Drive is one of the most inexpensive forms of fundraising and one of largest sources of income for charities.
- **Charities reach state employees.** Through the Combined Fund drive, charities have access to over 103,000 state employees to whom they might not otherwise have the opportunity to reach.

Benefits to Communities

Your donations help to achieve stronger, healthier communities locally, nationally, and globally by supporting programs in the following categories:

- Animals and the Environment
- Disaster Relief and Emergency Services
- Health and Medical Research
- Arts, Culture, and Humanities
- Education and Literacy
- Hunger and Food Distribution
- Human Services
- International Relief
- CFD Unspecified Fund/Federation Partners
- Children, Youth, and Family Services
- Housing and Homelessness
- Senior Centers and Services



For the first time since the program began in 1984, the Combined Fund Drive is now tracking volunteer hours that our state employees log at any of our member charities. At the end of the campaign, special recognition will be given to agencies and individuals who log the most hours.

The hours will be tracked by the CFD, agency volunteers, and any charities that benefit from the volunteer hours that are logged. Special recognition will be given to state employees and offices that show extraordinary volunteerism in their communities.

You can either use the VOLUNTEER TRACKER paper contribution form (*in the appendix of this document*), or sign into your online account and enter the hours using the tracker using the following steps...

1. Sign-in to your donor account
2. Click on MY VOLUNTEER HOURS
3. Fill in all required information
4. Click ADD

My Volunteer Hours

☒ Hide My Volunteer Information

Charity Name	Date	Number of Hours	Description	Modify	Delete
Thurston County Food Bank - 0316378	06/19/2013	5.00	Stocked shelves and assisted customers	Modify	Delete

Add Volunteer Hours

Charity Code Search

Charity:

Hours Volunteered

Date

Description



Fundraising and Event Ideas

Event Title	Event Notes
Tabling	Set-up a table with CFD forms, charity guides and charity giveaways - pens, key chains and post-its. It is ideal to do a tabling event in conjunction with another event such as an employee informational fair or flu shot clinic. Setting up a table in any high traffic area like a cafeteria or other place where employees gather is equally as effective. It is helpful to also invite a charity representative to help staff the table (ones with pets are always popular or find out who the most popular charities are from last year's campaign and invite them.) If time permits, it can be effective to have consecutive tabling events over two or three days.
Snack Cart	Purchase goodies such as cookies, popcorn, candy bars, fruit, etc. to sell at a small markup in your department. Decide whether you want to run the cart in the morning or the afternoon and the number of days per week you want to run the cart. When someone wants to buy a snack, give them the option to pay via a onetime gift using a giving form in the amount of their purchase. Turn in giving forms after each visit from the snack cart.
Bring your Pet to Work Day & Photo Op	Promote the event to your department and make sure employees know to bring pets to work (make sure you get authorization to have pets in your workplace). Have another staff member or a professional photographer on hand to take photos of pets and owners. You can charge coworkers a flat fee, have them fill out a giving form in exchange for having a photo taken or you can make giving optional. Have "doggy bags" with charity materials and pet and people goodies. Invite a local animal related charity to attend or have an animal food donation drive as part of the event.
Clothing/Blanket/Shoe/Food Drives	Identify the length of the drive, set-up barrels around your department/ neighboring departments and advertise the details including drop-off locations to coworkers. Count or weigh the collected items to use in thank you messages. If possible, invite the recipient charity to be present when turning collected good over.



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Coin Jar Collection	Give each coordinator or team member a coin jar to place at an active location and choose a recipient charity to which to donate the proceeds. Fundraiser can be part of a campus/agency-wide effort or in your department only. The drive can also be an ongoing effort. For example, if your agency has a controlled access entrance, place coin jars at each entrance and when someone forgets their ID card, they must donate to get in.
Bake Sales/Breakfast Bake	Ask coworkers in your department to volunteer to bring goodies to contribute to a bake sale (home-made items usually do better than store-bought treats.) Post signage in neighboring departments and other high traffic areas. Choose an area which will maximize sales such as a high-traffic area in your department. Have a "fill-your-plate" option for \$5 and have coffee or juice available for sale as well. Let employees use either cash, credit cards or giving forms to pay for treats. Include savory items in your bake sale to appeal to the early lunch crowd and have it run until 1:00 p.m. to get those looking for an after lunch dessert.
Chili/Cake/Cookie/Pie/Cook Offs/Bake Offs (example: Chili Cook Off)	Promote the cook off to department/neighboring departments, charge an entry fee for each pot of chili entered into the contest. Other ways to charge are to ask tasters to pay a fee for each chili taste and vote. You could also ask for a flat fee, suggested donation or allow anyone to participate regardless of donation. Give people the option to pay using cash, credit card or a giving form. Designate a coworker to be on the judging panel and ask a charity representative and your campaign assistant as well. Create categories for the judges such as: spiciest, judge's favorite, crowd favorite. etc. Prizes: the winner can choose the charity that will receive the total funds raised. You can also get prizes donated from local businesses.
Online "Fun Raiser" Auction	Define and promote the auction dates. For example, start on Wednesday, Nov. 16, 2012 at 8 a.m. and run through Wednesday, Nov. 23, 2012 at 4 p.m. Acquire donated items or items purchased by agency leadership. In the past, items have included professional or University of Washington sports tickets, sports logo wear, lunch with chair or department manager, original photography, etc.



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Silent Auction	Define and promote auctions date. Get items donated from businesses or ask coworkers to create specialty baskets filled with themed items. For example: movie basket, emergency kit basket, art basket, spa basket, etc. Ask employees to bid on items, give them the option to pay using cash, credit card or giving form.
Quilt Auction	If you have a talented seamstress in your office, ask if they would be willing to make a quilt or set of dish towels to auction off to fellow coworkers. You can also try to get a quilt donated.
Balloon Popping for Giving Forms	Each employee who is giving or turns in a giving form, increases contributions, etc. gets to choose a balloon with a prize written on a slip of paper inside. Let them choose a balloon to pop for their prize. You might consider limiting the number of balloons during the campaign to save on energy and resources. Prizes can include charity giveaways, they are fun and informative.
Media (Book/CD/Movie) Sale	Ask employees in your department to donate gently used or new media including tapes, CDs, DVDs, games, books and/or magazines. People can pay with cash, credit card or a one-time gift on their giving forms. Invite a charity representative to attend the sale to answer questions and share materials. Donate leftover media to a homeless shelter or a teen center.
Pizza/Spaghetti/Feast-Style Luncheon/Potluck	Hold a special luncheon, get pizzas donated or ask your leadership to donate them. Ask for a suggested donation for the meal and invite a charity speaker to give a short presentation during the lunch. Other options can include holding informal luncheons weekly/every other week during the campaign and inviting a series of charity speakers.
Halloween Mystery	Hold the event during the week leading up to Halloween. Participants will have to donate to get clues to solve the mystery. Whoever solves the mystery first wins a prize; prizes could include allowing the winner to designate the recipient charity.



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State Fair	Can't get away for the Puyallup Fair? Bring the fair to your office. Have "state fair" themed activities such as a coin toss, bean bag toss, jelly bean count, and a pie contest. Consider having a silent auction to boost proceeds to charity. Rent a popcorn or snow cone maker and sell the goodies to your coworkers. Invite CFD member charities to set-up informational tables. Promote the event through flyers, emails and to neighboring departments. Have giving forms and credit card payment forms on hand to let attendees bid on auction items.
Wine Tasting	Have wine donated and charge your coworkers a tasting fee.
Brown Bag Presentations	Schedule a variety of charity speakers to speak at lunch time during the campaigns. Brownbag presentations are an awareness event and do not require employees to donate. Ensure that giving forms and charity guides are available to the audience.
Dining for Dollars	Partner with a local restaurant for a lunchtime or evening event where part of the proceeds will be donated to charity. Promote the date to coworkers to get the maximum benefit.
Coffee Hour	Arrange for a charity or charities to be on hand for a CFD coffee hour. Encourage employees to stop by and learn about the charities and enjoy mid-day caffeine, cookies, and music. Hold a drawing for prizes such as Seattle Arts and Lectures Series tickets.
Trivia Contest	Trivia contests are a fun and interactive way to raise money for charity. There are several ways to plan a trivia contest. You can partner with a local pub, hold it during your lunch hour or after work. Identify your teams, choose trivia categories, set reasonable entry fees, and designate a charity of choice or let the winning team choose the recipient charity. At the University of Washington, coordinators held a trivia night and wrote their own trivia questions that reflected the nature of their department's work. Their department won the innovative event award for their event in 2011.



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Baked Potato Feed	When the coordinators from the University of Washington Human Resources Operations put on a potato feed lunch, they purchased the baked potatoes and all the sides, provided drinks, grapes and cookies all for \$5 per person. They baked the potatoes at home and kept them warm in food warmers. At the event, they transferred the potatoes from the food warmers to roasters/slow cookers so they were piping hot. They reserved a kitchen for prep and to keep sodas and vegetables cold. They also arranged for a charity speaker and procured a great door prize.
Sweat Shirt Raffle	Get a high-end or vintage sweatshirt and sell raffle tickets throughout the campaign. Let employees pay for tickets via one-time payroll deduction, credit card or cash.
Cuff Em & Stuff Em - Cookbook and Fair	Washington State Criminal Justice Training Commission and the Washington State Patrol partnered to develop The Cuff Em & Stuff Em Cookbook and Food Fight event. They procured recipes from their co-workers and held a design contest for the cookbook cover. They culminated the cookbook creation with a Food Fight. The Food Fight included a potluck, cookbook sales and a charity fair. Pay with cash, credit card or giving form.
Holiday/Themed Potlucks	Host a themed potluck such as Halloween, Thanksgiving, Crazy Hat, Ugly Holiday Sweater day, etc.) Create a contest for ugliest sweater, etc. Have charity info, charity guides, giving forms available. Invite a charity speaker.



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SPECIAL PROGRAMS DIRECTOR

Stephanie Horn



Stephanie is in charge of the Special Programs Division within the Office of the Secretary of State. This division houses the Address Confidentiality Program (ACP), the Productivity Board and the Combined Fund Drive (CFD).

Contact Stephanie if you need:

- OSOS policies
- Contacting agency leadership
- OSOS availability for events, communications with elected officials, budgetary spending and overall program changes

stephanie.horn@sos.wa.gov

(360) 902-4193

CFD PROGRAM MANAGER

Philip Kerrigan



Philip assists the Special Programs Director in running the CFD. The position also backs up CFD personnel and establishes connections with community charities.

Contact Philip if you need:

- Website requests
- To connect with volunteers and county committees
- Requests for state CFD presence at fundraising events
- Publications and marketing materials associated with the CFD

philip.kerrigan@sos.wa.gov

(360) 902-4182

RESOURCE COORDINATOR

Dawn Sanquist



Dawn is the CFD's unofficial firefighter. She tackles questions and concerns from donors, charities and volunteers, and addresses system questions for all participants. She also works on developing relationships between the community and the CFD.

Contact Dawn if you need:

- Help with donor accounts
- General CFD questions and inquiries
- Requests for fundraising events or donations
- Inquiries regarding reimbursement for fundraising events

dawn.sanquist@sos.wa.gov

(360) 902-4162

PROGRAM SPECIALIST

Heather Lucas



Heather works with the OSOS finance department and IT staff on crucial issues such as charity disbursements, donations and back-end system problems. She also assists with marketing, like videos and printed materials.

Contact Heather if you need:

- Reports
- Digital stories
- Disbursement of funds to charity
- Help with donation, reconciliation or payroll contribution issues

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(360) 902-4181